



**California Solar Initiative**

**Interim  
Marketing & Outreach  
Plan - PY 2011**

**December 15, 2010**

## California Solar Initiative CCSE Interim Marketing & Outreach Plan – PY 2011

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## **I. INTRODUCTION**

This document outlines proposed marketing activities for the 2011 calendar year that the California Center for Sustainable Energy (CCSE) will implement to meet its responsibilities as the Program Administrator for the California Solar Initiative (CSI) within the SDG&E service territory.

In accordance with Appendix A to Decision 0705-047 (D.07-05-047, referred to subsequently herein as the Decision), we submit this plan on an interim basis, subject to Energy Division staff review and approval in consultation with the assigned Commissioner. The plan outlines education and market transformation activities that will allow CCSE to educate key industry stakeholders and promote CSI to prospective market participants, customers and community members that can help transform the solar marketplace.

According to the Decision, up to \$5 million per year will be available for coordinated state-wide marketing and outreach. Whether these funds will be directed by the CPUC or channeled towards regional efforts through CSI Program Administrators (PAs) will be determined at a later date in Phase II of this rulemaking. In the interim, the Decision specifies that each PA dedicate \$500,000 to deliver marketing and outreach, focusing on program information for consumers and installers and training for installers.

With the CSI non-residential incentive budget currently expended and CSI residential now in Step 8, significant advances were made during the initial M&O interim phase in achieving the goals of brand awareness and market transformation. When the program began in 2007, marketing efforts focused on media coverage for solar via either paid advertising or earned media. CCSE led the way in the SDG&E service territory branding the program with a comprehensive media strategy including TV, radio, online, print, direct mail and earned media. CCSE found 2010 to be a transitional year; insofar as there is broad program awareness and the market has changed with solar companies now carrying the weight of solar advertising and PR. To meet the needs of the next level of market transformation, CCSE will adopt more targeted marketing strategies in 2011. The 2011 M&O Plan provides defined marketing goals and activities for 2011 recognizing that implementation strategies have evolved in response to the needs of the marketplace and specific customer feedback. The plan also includes a 2010 year in review detailing activities undertaken and their outcomes.

## **II. 2010 M&O ACTIVITIES - YEAR IN REVIEW**

### **Statewide Coordination – Cooperative Marketing Efforts**

#### **1. *Newsletter and Tradeshow***

In 2010, planning of statewide M&O included coordination among the PAs for ongoing projects, such as the CSI newsletter and trade show participation and a proposed cost-sharing methodology for additional collaborative projects. To avoid time-consuming co-funding agreements, PAs divided costs in 2010 by each taking the lead on collaborative projects of roughly equal cost (e.g. the newsletter and trade shows).

2010 Collaborative items cost-sharing

- CSI monthly newsletter– CCSE
- Intersolar Tradeshow San Francisco – PG&E

- Solar Power International 2010 Los Angeles – SCE

## 2. **Solar Buzz Cards**

The PA's also collaborated on solar buzz cards that were distributed at the Solar Power International Public Forum and to CSI General Market and Thermal workshop attendees. The buzz cards plug into a USB port opening a micro site for solar information and resources. Each PA received approximately 300 buzz cards to distribute in their respective regions as a promotional item complimenting the statewide Solar Energy Month.

## 3. **Bid Comparison Form**

CCSE initiated the Bid Comparison Form as a consumer advocacy piece that became a statewide collaborative item. The form meets the consumer protection program goal by offering solar customers the opportunity to compare contractor bids and by providing valuable resources such as Contractors' State Licensing Board and the Better Business Bureau contact information. The Bid Comparison Form is intended to be used as a resource item on the solar buzz cards and as an interactive worksheet at the workshop "Solar for Homeowners 2: Be a Smart Solar Customer."

## **Training & Education**

The 2010 budget for training and education was increased from 2009 in response to positive feedback on their value and demand by stakeholders and customers. The workshops serve as a vital communication tool for providing timely information to and receiving input from attendees.

CCSE continued to build on its prior success in educating **customers** about the benefits of solar. The trainings and workshop efforts CCSE provides to the San Diego region through our *Solar for Homeowners* monthly workshops, *PPA Seminars* and the various outreach events help facilitate a growing number of homeowners and business owners to go solar.

Moreover, CCSE sustained its efforts to ensure **solar contractors** understand the CSI Program and complete the application process as efficiently as possible. CCSE continued to place heavy emphasis upon assisting the transition of many new contractors who have recently entered the solar industry. By doing so, CCSE helped educate solar providers about the business practices that are needed to ensure a transparent and ethical solar market.

Throughout the summer months of 2010, CCSE held weekend workshops in addition to the regular workshops to reach potential members of the residential solar market that might not be able to attend workshops during business hours.

CCSE held the following workshops on a recurring basis in 2010:

### **Solar for Homeowners**

This workshop provides homeowners with the basic information of how to read their annual electricity usage and properly size a PV system for their home as well as an overview of the California Solar Initiative and the financial and environmental benefits of going solar.

### **Solar Shade Workshops**

On a monthly basis, CCSE holds a solar shade workshop that reviews the CSI program's shade measurement requirements and the CSI inspection protocol.

### **California Solar Initiative (CSI) Application Process**

CCSE held quarterly CSI Application Process workshops focusing on the CSI application process, the introduction of PowerClerk's upload feature and changes. During the months leading to step changes, CCSE increased the frequency of these workshops to ensure a smooth step change.

### **Power Purchase Agreements Workshop Series**

In the summer of 2010, CCSE offered monthly workshops regarding all aspects of Power Purchase Agreements (PPAs) such as feasibility studies, contract issues and case studies.

### **Solar Technology Series**

In the second half of 2010, CCSE's initiated the Solar Technology Series which explores the latest developments in the solar photovoltaic industry. The workshops are for solar developers, installers, engineers, researchers and PV enthusiasts who want to learn more about solar technologies and discuss new and emerging ideas. Topics discussed are: Micro-Inverters and Maximizers, PMRS and PDP Services.

In addition to these recurring workshops, CCSE has offered the following one-time workshops in 2010 (mainly presented by outside experts):

Utility Scale Solar (in collaboration with SDG&E)	PV Permitting (in collaboration with the City of San Diego)
Interconnection Best Practices (in collaboration with SDG&E)	Economics of Solar (in collaboration with Clean Power Finance)
Solar for Non-Residential Customers	Energy Efficiency and Solar (for residential and commercial markets)
Solar Marketing and Ethics (in collaboration with CSLB and CALSEIA)	Solar Marketing (in collaboration with Sun Marketing)
Solar for Contractors (in collaboration with Solar Training Institute)	Business of Solar (in collaboration with Verve Consulting)
NEM Smart Metering (in collaboration with SDG&E)	Solar Roofing Best Practices (in collaboration with Quick Mount PV)

CCSE ran solar workshops at special events at CCSE such as "Solar Day" in June 2010 and "Family Energy Day" in September 2010. Workshops held included Solar for Homeowners, How to Select a Solar Contractor, solar cooking demonstrations and a panel of solar homeowners describing their experience with solar.

CCSE expanded trainings outside of the Energy Resource Center (ERC) including various diverse locations in the SDG&E service territory as detailed in the Bundled Outreach reporting on 2010. Offering workshops offsite allowed CCSE to further spread the CSI message to established community groups.

CCSE conducted **participant surveys** at each workshop analyzing them regularly to improve ongoing training and education offerings. The surveys measured participant satisfaction and workshop content and included a “how did you hear” question to help determine effective marketing efforts.

In early 2010, CCSE executed an email workshop evaluation trial to streamline the analysis process. Based on results of this workshop participant survey, CCSE will continue to use in-person evaluations immediately following the workshops as they provide better response rates. The trial emailed workshop evaluation results are as follows: March 25, eight people out of 16 responded; April 8, four people out of 27 responded.

Results of the participant surveys are as follows:

2010 Workshop Trends (All Titles)	
• <b>Overall quality:</b>	Increase of 3% rating “excellent”, increase of 2% rating “very good”
• <b>Knowledge of Speaker:</b>	Increase of 23% rating “excellent”
• <b>Will you apply this knowledge?</b>	Decrease of 1% rating “yes”
• <b>First workshop:</b>	decrease of 5% “yes”
• <b>Highest # attendees by top type:</b>	Residents/homeowners
• <b>How heard about workshop:</b>	#1 CCSE’s list, #2 word of mouth, #3 radio, #4 newspaper/magazine, #5 other

### Direct Mail and Digital Direct Mail

CCSE executed 2 direct mail postcards and collaborated with SDG&E on a direct mail insert into the Q3 ERC/SDG&E workshop calendar. These direct mail sends contained solar messaging and CSI branding designed to pique interest in solar and drive attendance to Sustainable Energy Week (SEW), a week-long series of events for promoting the CSI, where solar for homeowners, solar water heating public workshops and energy efficiency workshops were presented. CCSE also launched two digital direct mail pieces to promote Family Energy Day and the Clean Energy Conference, the two primary public outreach events during the week showcasing sustainable energy and the CSI.

2010 Direct Mail & Digital Direct Mail sends:

- Approximately 46,000 postcards were mailed to single family homes within a six mile radius of CCSE to drive attendance to SEW’s free Family Energy Day.
- Workshop calendar listing all program workshops mailed quarterly to 15,000 SDG&E/CCSE ERC mailing list customers
- Quarterly calendar insert mailed out to the regular workshop mailing list

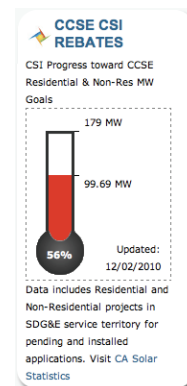
- Digital Direct Mail to 44,545 Homeowners = families with children and pools for Family Energy Day
- Digital Direct Mail to 30,625 businesses of 20-30 employees with \$500K+ annual revenue for the Clean Energy Conference

## Interactive Outreach

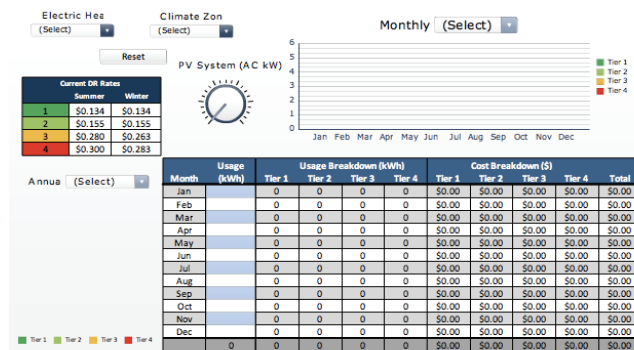
The implementation of the majority of activities in this category in 2010 was closely related to the launch of the new *Go Solar, California!* Website.

Web developments in 2010:

- Created a thermometer to visualize the number of solar installations to date toward the regional goal, as you see to the right
- Updated the Electric Rate Analyzer to support the current rate structures, as shown below
- Continuously refreshed and updated photos and language on the CSI website to keep the program page interesting and easily navigable for returning and new visitors
- Include the latest workshop presentations on the CSI website



Electric Rate Analyzer

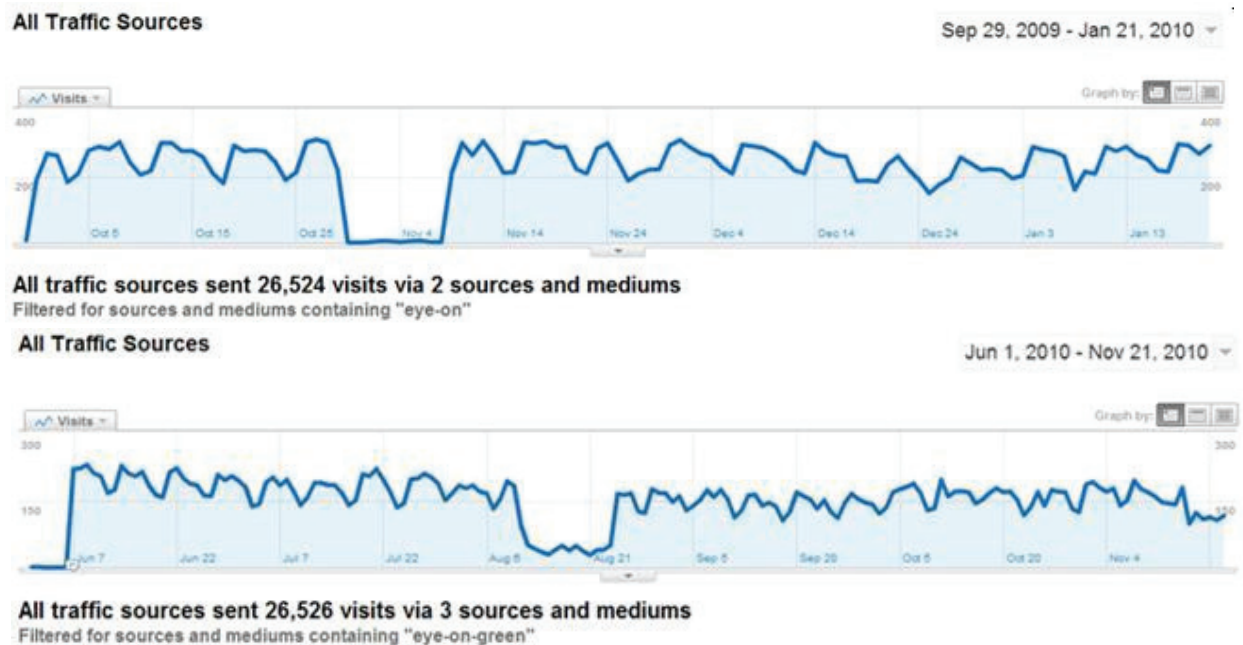


## Radio

CCSE continued in 2010 with the CBS "Eye on Green" radio campaign due to its success in 2009 when it drove more than 21,680 unique visitors to the CSI webpage on the CCSE website. In an attempt to capitalize on the large volume of web traffic, the 2010 campaign tested a different approach implementing a web contest to drive workshop participation. Participants earned contest points and free tickets to local attractions by attending CSI workshops. The ROI on this campaign for 2010 and for radio in general for years past indicates that mass media strategies worked better for building brand awareness in early stages of the program than driving actual workshop attendance. The exception to this trend is KPBS radio advertising, which draws new workshop participation on an ongoing basis.



Google Analytics from Eye on Green ad campaigns 2009 and 2010:



### Newspaper and Magazines

CCSE placed ads in a number of print publications to promote workshops and outreach events that featured CSI and CSI-T programs. Where possible, programs shared cost and messaging to leverage budgets and optimize ad spend. CCSE included unique URLs on each ad to track response but believes that ads performed best for general brand awareness.

The following factors made ROI tracking unreliable:

- most events did not require registrations
- walk-ins (over the year, a significant amount) do not capture online "how did you hear" question
- responders may not type in the exact URL
- participants either don't always fill out or do not accurately fill out a workshop evaluation

2010 Print and Digital Advertising	
Program	Description
ERC/SGIP/CSI	4 half pg ads <i>San Diego Business Journal</i> San Diego Excellence in Energy Awards (SANDEEs)

ERC/SGIP/CSI	SANDEEs full page, full color ad in the <i>San Diego Business Journal</i> + 1/3 supp cost
CSI/ST	UT 1 full color SANDEES Ad
CSI/ST	Earth Day ad (5.67w x 19.25h) in the <i>Union Tribune</i> "You've Got the Power - Now Take Control"
CSI/ST	<i>San Diego News Network</i> ad (digital 5w x 10.5h) full color "You've Got the Power - Now Take Control"
CSI/ST	<i>Construction Leaders Today</i> full page, full color ad "You've Got the Basics - Now Add the Energy!"
CSI/ST	<i>Uptown News</i> full page, full color ad back cover "Kensington Clean Energy Festival" + 3 full pages at 1K on 5/19, 6/11, 6/25 free editorial on 6/18
CSI/ST	<i>Our City San Diego</i> full page, full color ad "Make the Transition to a Sustainable Future"
CSI/ST	<i>North Park News</i> full page, full color ad "Kensington Clean Energy Festival"
Solar Thermal	<i>Small Business Resource</i> full page, full color ad "Don't Get Burned by Your Own Hot Water"
CSI/ST	Sustainable Industries full page, full color ad "Get the Local Energy Connection"
CSI/ST	SDBJ Conference Ad 1/2 page
CSI/ST	UT Conference Ad front pg business section
CSI/ST	UT Conference Ad front pg business section
CSI/ST	UT Conference Ad front pg business section - Free
Solar Thermal	Edible San Diego Back Cover
CSI/ST	SDDT SEW Supplement to 12K subscribers full page CSI + fp Solar thermal ads
CSI/ST	UT SEW Conference Ad
CSI/ST	SEW Family Energy Day DDM
CSI/ST	SEW Business Conference DDM
CSI/ST	Daily Transcript SEW Supplement

### Public Relations/ Media

In 2010, CCSE issued press releases and otherwise promoted latest developments in the solar sector through newspaper, web and both quarterly and monthly magazine articles. CCSE engaged the media with check presentations at high profile locations (such as Harrah's Rincon Casino, etc.) and played a pivotal role in providing subject matter experts for PACE financing

articles and other breaking solar news. CCSE earned a total of 69 press mentions at the time of this plan writing in 2010.

2010 Press Coverage By Program			
	CSI	ST	MASH
Print	33	19	10
Broadcast	1	2	4

2010 Press Coverage By Location	
San Diego region	28
California	15
National	25
Europe	1

2010 Press Coverage By Type	
Print	29
Broadcast	7
Online	31
Magazine	2

### Marketing Collateral

CCSE created a 'Reduce then Produce' whole house showcase collateral piece (pictured right) and a one-page handout including energy efficiency and consumer protection information to complement workshop presentations. CCSE also collaborated with other PAs on the Contractor Bid Comparison worksheet, gave coverage to the programs in the annual report and branded all Sustainable Energy Week collateral with *Go Solar, California!* as a primary event sponsor.



CCSE distributed (approximately) the following collateral at workshops, outreach events and the Energy Resource Center:

- 2,500 'Reduce then Produce' whole-house showcase collateral pieces
- 4,300 consumer guides
- 2,500 CSI tri-fold brochures and
- 4,470 residential fact sheets for public distribution
- 2,700 commercial fact sheets
- 2,775 installer fact sheets

### Online Training

In 2010, CCSE began developing a series of internet-based trainings for contractors and consumers expected to be fully complete by Q4. These internet trainings will supplement live workshops, specifically directed to contractors and consumer who are not able to attend workshops run during business hours.

Webinars developed in 2010 include “CSI Application Process Workshop,” mainly targeting solar contractors to educate them about the CSI application process using PowerClerk, specifically the document upload feature. Webinars are divided in several segments for easy downloading. Additional webinars will be developed in 2011.

### Bundled Outreach

CCSE invested more heavily in bundled outreach in 2010 in order to address the needs of a transitioning market with a more targeted approach to delivering program messaging. This tactic, rather than broad based brand awareness such as TV, allowed CCSE to both reach a wide audience and deliver in depth program information through presentations. The *Go Solar, California!* brand was heavily promoted at the events and appeared on all event advertising and collateral (including event signage and banners). CCSE also participated in 45 community outreach events (including Earth Day and the ASES National Solar Homes Tour in San Diego County) reaching an estimated 190,000 individuals.

In 2010, CCSE held the following community outreach events:

- San Diego Excellence in Energy Awards (SANDEEs) (+350 attendees)
- Solar Day (+200 attendees)
- Kensington Clean Energy Festival (+250 attendees)
- Sustainable Energy Week
- Family Energy Day (+1000 attendees)
- Clean Energy Commercial Tours (+ 100 attendees)
- CCSE Clean Energy Conference (+500 attendees)

SEW Conference Follow-up Survey Results	
•	39% of attendees rated their overall experience as good or excellent.
•	The value of attendance as related to time and money spent was rated 3.91 out of 5.
•	Attendees found that the personal access to speakers and exhibitors was most valuable conference feature. They found the ideas/concepts to be above average.
•	86% of attendees would recommend the conference to their colleagues.
•	67% of attendees are currently employed in the clean energy industry.
•	The majority of attendees were: consultants, business owners and management.
•	How did the attendees hear about the conference? Referral by staff, website, workshops, word of mouth, KPBS.
•	Survey respondents noted: Keep up the good work, the evening networking was appreciated and presenters were very well selected.

### Alliances and Co-Promotions

In 2010, CCSE implemented Focus Group meetings during which key stakeholders of the San Diego solar sector met to discuss latest development and emerging issues in the solar sector. The meetings were designed to create better communication among the solar industry with the ultimate goal to create a sustainable and ethical solar market. During the first Focus Group meeting in June 2010, five key issues were identified as future discussion topics:

- Solar financing
- Solar marketplace quality control with new contractors entering the marketplace
- Streamlining and standardization of the permitting process
- Working with the utility: smart meters, net metering, interconnection
- Future after CSI

Consecutive meetings focused on solar financing and identified challenges and highlighted residential solar financing options.

CCSE joined the Building Owners and Managers' Association (BOMA) in 2010 to seek out new B to B marketing opportunities. CCSE's Marketing Manager serves on the group's Energy and Sustainability Committee to help inform about distributed generation program partnership opportunities.

CCSE also became a Better Business Bureau (BBB) accredited business in 2010. The CSI team has been collaborating with the BBB on consumer awareness issues throughout 2010 informing consumers about good business practices in the solar sector.

CCSE also collaborated with the CA State License Board (CSLB) and the CA branch of the Solar Energy Industry Association (CalSEIA) in raising awareness about consumer protection in the solar market. CCSE organized various workshops related to consumer protection from "What every solar contractor must know" to "Marketing and Sales Ethics". CCSE collaborated with the CSLB in the publication of an article about the incorporation of a soft cap into the CSI program. The article was published in the CSLB monthly newsletter and appeared on the CSLB website.

CCSE was integral in creating a local San Diego CalSEIA chapter. In June 2010, CCSE convened more than 80 solar stakeholders in collaboration with CalSEIA for a Focus Group discussion on how to create a sustainable solar market.

CCSE also developed the Green Career Network (GCN) and actively promoted workforce development with workshops and other training. As part of this partnership the CSI Team worked with CCSE's Workforce Development staff and Talent Evolution to identify the workforce development needs of the solar industry and provide resources to employers and those seeking jobs in the solar industry.



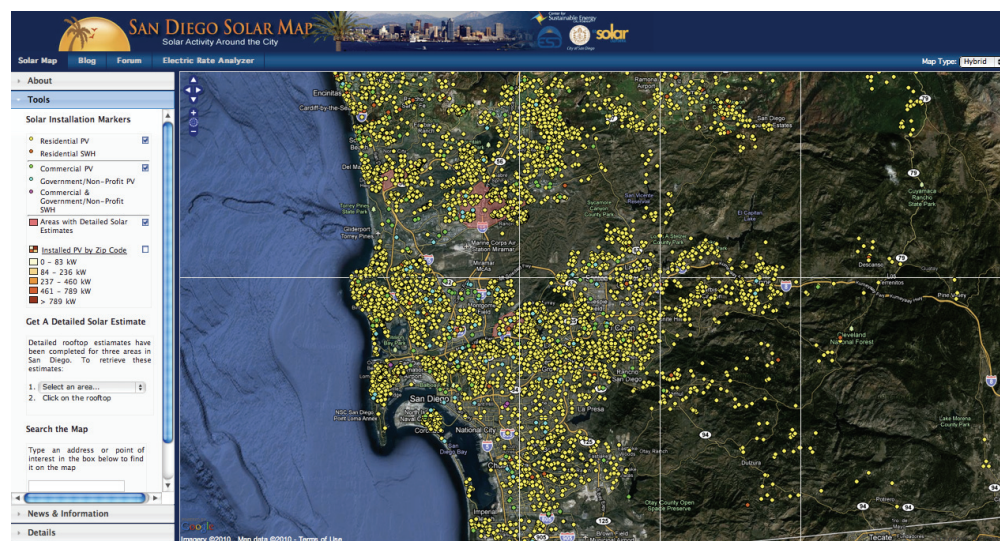
The following activities were conducted in 2010:

- Developed list of public and private training organizations that provide solar training and posted this information on the Green Career Network website
- Developed list of resources to help employers offset the cost of training and hiring employees and posted this information on the Green Career Network website
- Created workforce development survey that was sent to hundred of local solar companies
- List "Go Solar California" on Green Career Network website
- Hosted GCN networking room at San Diego Clean Energy Conference with 20+ vendors
- Worked with Cuyamaca College to develop solar water heating curriculum
- Partnered with Able Disabled Advocacy Group to host Green Industries Career Fair
- Provided advice and support to those looking for jobs in the solar industry
- 

CSI Workforce Development 2010 Survey Results	
• What type of solar installation service do you provide?	
○ 100% photovoltaics	
○ 27% solar water heating	
○ 20% solar pool heating	
• Who are your target customers:	
○ 33.3% residential	
○ 13% commercial	
○ 53% both	
• Do you plan on hiring any additional employees in the next 6 to 12 months?	
○ 79% yes	
○ 21% no	
• Do you use social media to promote your company and post jobs such as Facebook, LinkedIn, etc?	
○ 29% yes	
○ 71% no	

## Solar Map

The solar map has seen some success since its launch in July 2009 with 8,851 visits (72.07% new visits) and 12,240 page views with an average time on site of 1:15. CCSE requested a carry-over of 2009 CSI M&O funds for further developments to the solar map in 2010 to further its development and enhancement.



Enhancements in 2010 included:

- Precise evaluations of solar potential for publicly owned buildings and major institutions throughout the City of San Diego and the region as a whole: This process was begun in 2010 with 19 municipal buildings in the City of San Diego. These sites are now being used to demonstrate the concept to other municipalities. We are also evaluating the potential to include detailed solar shade assessments more broadly across the service territory. These assessments will not be as refined as the municipal project, but will show more broadly the impacts of shading across a large number of residential and non-residential buildings.
- The residential decision making tool has been finalized and coded into a webpage. We are now finalizing the user interface and expect to have it on the solar map in the first quarter of 2011
- The integration of property-assessed financing programs is on hold pending final legislative and judicial action

## **MASH**

In 2010, the majority of MASH marketing revolved around Track 2. Along with providing a MASH updates and highlighting Track 2 at Housing California 2010, there were several coordinated Track 2 workshops between the PAs in 2010. CCSE allocated a specific earned media budget for proactive media coverage in 2010. Our success is evident in the rapid succession of step changes and contribution to statewide goals.

2010 MASH Accomplishments:

- Track 2 workshop
- 7 track 2 submittals
- 7 completed projects in Track 1
- \$3.4 million in waitlisted projects
- CCSE & MASH was covered by the NY Times, San Diego Tribune and KUSI News.
- 2 incentive presentation events, attended by Mayor Sanders
- Coordinated a roundtable with the SD Housing Federation on Energy Efficiency in the Low Income Housing Sector
- Reno Out West Conference speaking engagement on MASH & PV in affordable housing
- Presented MASH statewide Semi Annual Progress Report at CSI's Public Forum

## **III. 2011 M&O PROPOSED ACTIVITIES**

### **Introduction: CSI Program Sustainability**

CCSE has been driving program brand awareness and market transformation in the SDG&E service territory since program inception in 2007. CCSE's role in marketing the program and creating industry stakeholder partnerships and active participation in workforce training created a significant impact in the solar marketplace. As a catalyst for change in the San Diego region and leading the state in solar rooftops, CCSE is in a unique position to take solar to the next

level. The following M&O plan for 2011 takes into account remaining market barriers and outlines a specific strategy to help the state fulfill long term California Solar Initiative goals and see the program through to its successful end.

### **M&O Goals 2011: Education & Outreach to Overcome Market Barriers**

1. **Consumer Protection:** Collaborate with industry stakeholders and watchdog organizations to educate consumers about making smart contracting choices.
2. **Solar Financing:** Inform possible lenders about market viability with a goal of creating more lending options and help consumers identify financing options.
3. **Reduce then Produce – Energy Efficiency & Solar:** Inform consumers about the relationship between EE and solar and educate on how to make smart energy choices focusing on EE first. Build upon and collaborate with CCSE Retrofit Team and SDG&E EE Programs. The hopes for this effort are to create enough general awareness regarding energy efficiency that would allow the Program to remove the residential energy efficiency audit requirement that is required for all new incentive applications. Instead, the Program would utilize the Energy Efficiency Disclosure form to capture relevant information on the consumers experience with Energy Efficiency. As planned, this information will be collected through the CSI online application tool, PowerClerk, allowing for the impact of this new set of valuable data to be analyzed through the Program's M&E activities. By removing this requirement, the CSI Program and Applicants would also be able to significantly save time and money.
4. **Stakeholder Outreach:** Provide training to key stakeholders and new business sectors to overcome market barriers (Permitting Agencies, Real Estate Agents, Lenders, etc.)

### **M&O Activities to Achieve 2011 Goals**

CCSE will implement the following activities for marketing and outreach in both the business to business (B to B) and business to consumer (B to C) markets:

#### **Consumer Protection**

CCSE will continue to monitor applications, provide oversight of contractor practices and execute the following B to C activities to raise awareness among consumers about how to find the right contractor:

- **Training and Education** – CCSE recognizes the need to engage customers on a secondary level after first contact at Solar for Homeowners workshops. Therefore, in addition to ongoing Solar for Homeowner workshops, CCSE will attempt to lead potential solar customers through the decision-making pipeline by offering a “Solar for Homeowners 2: Be a Smart Solar Customer” workshop. This workshop will engage participants in the next step to going solar and provide the recently created Bid Comparison Form as an interactive worksheet. Presenters will walk participants through both the worksheet and the necessary steps for finding a viable contractor. Moreover,



CCSE will offer “Solar Fairs” at which homeowners will not only learn how to go solar but also will get the opportunity to talk directly to the various installers present and directly compare the quotes received.

- **Online Training**— In order to make solar trainings available to customers who are not able to attend workshops at CCSE in person, CCSE will create webinars for all major workshops presented. Customer will be able to download the webinars from the CCSE website and review them in detail by section. Both Solar for Homeowners 1 and 2 workshops will be presented in this format. CCSE will also create videos for using the Electrical Rate Analyzer tool, which will enable both consumers and contractors to interpret the impact of photovoltaic in the tier electric bills.
- **Marketing Collateral** – finalization and printing of the Bid Comparison Form and percentage contribution (divided amongst programs) for workshop advertising in ERC workshop calendar. Create case studies (1-pagers) guiding consumers through the solar contracting process.
- **Radio Tags** – Advertising at KPBS radio highlighting each upcoming workshop to drive participation of a new audience. Also highlight online training options.
- **Direct Mail and Digital Direct Mail** – quarterly purchased mailing lists of targeted direct and digital direct mail highlighting consumer protection issues as well as upcoming workshops to draw new workshop attendance. This strategy will be supported by ongoing e-blasts and newsletters to promote B to C trainings.
- **Interactive Outreach** - CCSE will create a “Smart Solar Customer” toolkit including collateral resources and links and promote this resource via the aforementioned trainings, collateral development and direct and digital direct mail. Use of social media: Facebook/Twitter to engage the B to C market and promote workshops and outreach events.

### *Solar Financing Education*

CCSE has identified limited finances as one of the major deterrents for consumers to go solar. To educate customers about existing and emerging solar financing options, CCSE will implement the following B to C strategies:

- **Training and Education** - Run workshops on residential solar financing options for consumers. Offer workshops on third party financing mechanisms for commercial customers such as Power Purchase Agreements. Educate consumers about existing tax benefits when going solar by offering tax workshops for residential customers to help them understand how to claim their solar investment on their annual state and federal income taxes.

- **Online Training**– CCSE will present residential solar financing and tax workshops as webinars downloadable from the CCSE website.
- **Marketing Collateral** – Development, revision and/or reprint of solar financing resource fact sheet based on SCE’s financial brochure
- **Direct Mail and Digital Direct Mail** – quarterly purchased mailing lists of targeted direct and digital direct mail highlighting financing options and as well as upcoming workshops to draw new workshop attendance. This strategy will be supported by ongoing e-blasts and newsletters.
- **Radio Tags** – Advertising at KPBS radio highlighting each upcoming workshop to drive new consumer participation at solar financing workshops. Also highlight online training options.
- **Interactive Outreach** - Create solar info website toolkit for homeowners, contractors and lenders including collateral, website updates with financing options, and resources/links to lenders and other financing contacts. Provide social media updates on solar financing as news becomes available.
- **Alliances & Co-Promotions** - hosting stakeholder focus groups with banking professionals to address the value proposition of solar and solar financing

### *Reduce then Produce: Energy Efficiency & Solar*

The solar market is now at the right time to integrate the energy efficiency message into going solar. Now that contractor training and EE rebates are in place with Energy Upgrade CA and other retrofit programs, the market can overcome contractor and consumer reluctance to becoming energy efficient first. The CSI team intends to collaborate with CCSE’s Retrofit Team on whole house performance EE measures to both Solar/Solar Thermal contractors and homeowners (building awareness about EE support available on the way to going solar in both the B to B and B to C markets). CCSE plans to execute the following B to B and B to C activities:

- **Training and Education** - EE & Solar Series consumer workshops including delivery of case studies demonstrating the benefits of energy efficiency on the way to going solar (collaboration with Energy Upgrade CA and all retrofit program messaging including B to B and B to C trainings). Offer guided tours through the Energy Resource Center at CCSE showing homeowners and the general public the benefits of energy efficiency and solar hands-on.
- **Online Training** – CCSE will present EE & Solar Series consumer workshops including detailed case study analysis of EE and solar investments as webinars downloadable from the CCSE website

- **Marketing Collateral** - One page case studies (e.g. Joe Homeowner's savings w/ EE, w/ solar, w/ both)
- **Direct Mail and Digital Direct Mail** – quarterly purchased mailing lists of targeted direct and digital direct mail highlighting the energy efficiency and solar message as well as upcoming workshops to draw new workshop attendance. This strategy will be supported by ongoing e-blasts and newsletters to promote B to B and B to C trainings
- **Radio Tags** – Advertising at KPBS radio highlighting each upcoming workshop to drive new consumer participation at EE & Solar Series workshops. Also highlight online training options
- **Interactive Outreach** – Build on Retrofit Program and CSI portions of the CCSE website to co-promote programs, toolkits and resources. Provide Facebook/Twitter updates on workshops
- **Alliances & Co-Promotions** - outreach to EE/Solar contractors and their organizations

As previously stated, the heavy emphasis on the awareness and benefits of reducing your electric load prior to installing solar would allow for the CSI Program to remove the Energy Efficiency Audit requirement. As more homeowners utilize the existing infrastructure of energy efficiency programs and resources through programs such as Energy Upgrade CA and other whole house performance and retrofit programs, the CSI Program can be assured that the message of reduce then produce is not lost. This allows the program to virtually guarantee that prospective solar customers have not just learned about but also implemented energy efficiency measures which in turn reduces the amount of solar the homeowner would need to install. Coupled with the collection of good and accurate data on energy efficiency implementation and awareness, the Program may be able to report on the impacts energy efficiency has had on those who have installed solar.

### ***Stakeholder Education & Outreach***

CCSE intends to implement B to B strategies to reach solar sector stakeholders who can make a positive impact on the solar market. Such stakeholder groups include permitting agencies, homeowner associations, consumer advocacy and enforcement groups such as the CA State License Board and the Better Business Bureau, industry groups such as CalSEIA, other clean energy focused non-profits, women's organizations such as the Women's Construction Coalition etc. CCSE has identified two business sectors in particular that are instrumental in overcoming marketplace barriers. These two sectors, which we plan to strategically target, are real estate and banking. CCSE's intent is to provide training and create win-win relationships in order for these key stakeholders to understand the value proposition of solar.

CCSE will undertake the following B to B activities:

- **Training and Education:** Offer workshops that provide bankers and real estate agents the value proposition of solar w/ supporting collateral/case studies

- **Online Training** – CCSE will provide short webinars on the value of solar downloadable from the CCSE website.
- **Marketing Collateral** - Create “Best Practices” toolkits for each stakeholder group
- **Direct Mail and Digital Direct Mail** – purchase direct mail and collaborate with digital direct mail B to B strategists/vendors to buy lists for targeting real estate and banking industry decision makers for focus groups and workshops. CCSE Weekly Roundup e-blasts promoting these workshops to CCSE industry contacts for direct and word of mouth advertising
- **Interactive Outreach** – provide resource toolkit for the various stakeholders. For example, provide a downloadable toolkit with information regarding the financial benefits of solar, investment viability and payback periods to banking professionals. Provide information on the importance of solar financing and the value proposition of solar on the CSI webpage.
- **Alliances and Co-Promotions** – Host focus/working groups for key industry stakeholders to better understand industry objections and roadblocks to driving the value proposition of solar in the consumer markets. Join stakeholder associations and/or attend networking events to build strategic relationships with industry professionals. Work with stakeholders to ensure that they incorporate solar in their messaging (Newsletter, e-blasts, website banners etc.)

## Additional Activities Supporting 2011 Goal Achievement

### 1. Public Relations/ Media

CCSE will continue to create media opportunities for the CSI programs. With the new retrofit programs underway, CCSE will optimize press opportunities with these new programs, where possible, to drive the EE/solar message.

### 2. Bundled Outreach Events

CCSE will engage in various community-related activities and events to promote the solar message:

- Community event participation at CCSE and collaborative community events to publicize programs in the B to C market. Also, collaborative bundled outreach events with Retrofit Program Team where applicable in both the B to B and B to C markets.
- Sustainable Solar Education and Climate Change – Solar messaging is a fundamental part of CCSE’s Climate Change program outreach to 5-12<sup>th</sup> grade students via the Green Learning Adventure (GLA), and CCSE has been reaching approximately 8000 new individuals each year through this program as a value add to budgeted marketing and outreach. In 2011, however, CCSE would like to develop solar lesson plans including interactive games, quizzes and lectures to make the message of solar truly

sustainable. In addition to student outreach to approximately 5650, information makes its way to an additional 2125 parents through this approach. The GLA participated in 35 events last year and also includes a teacher-training element (reaching about 225 educators) for program longevity in which solar messaging will continue to be included. CCSE respectfully requests that we incorporate funding for the Green Learning Adventure as part of a long-term sustainable strategy for going solar.

### **3. Training and Education Special - Train the Trainer**

CCSE will hire an outside vendor to train workshop presenters on how to optimally deliver workshops including:

1. Revised residential workshop presentation in PowerPoint, speaker notes, adult learning activities, participant handouts, materials for train-the-trainer workshop, in-person train-the-trainer workshop for staff
2. Animated Flash Presentations: General concept of PV system, full-screen format for all animations. Optional: YouTube format (without Flash controls) for all animations
3. Teaser Videos: General concept “commercial” for CSI overview of system and system rebate and financial information plus workshop participant testimonials
4. Flowchart for CSI Contractors: A detailed flowchart organized by system size that clearly explains the application process, payment process and metering requirements for projects

### **4. Workforce Development**

CCSE will continue workforce development through efforts with the Green Career Network. In 2011, the partnership will continue working on activities that promote solar and help job seekers find training and employment in the growing solar industry. The goal is to make the Green Career Network a one-stop shop for information related to solar education, job opportunities, events and employer resources. In 2011 we will accomplish the following activities:

1. Conduct outreach to local solar companies in an effort to get them to list available job opportunities on the Green Career Network website.
2. Profile solar companies on the Green Career Network
3. Continue to track education and training opportunities in solar and post on the Green Career Network
4. Conduct workshops and events to support job seekers and employers
5. Provide advice and support to those looking for jobs in the solar industry
6. Maintain and enhance the Green Career Network on CCSE’s website.

### **5. Cooperative Marketing Efforts**

Continue ongoing statewide collaboration activities such as CSI newsletter, buzz card updates, collaboration on *Go Solar, California!* web updates (possibly to current solar customers), Solar

Energy Month and tradeshow participation with an emphasis on co-promotion with Energy Upgrade California programs.

### **MASH Ongoing M&O Activities**

Host a workshop (at least one workshop per year) targeted to the affordable housing sector

1. CCSE will host a MASH Track 2 workshop in Q1, January 2011 in preparation for the upcoming proposal cycle.
2. Present MASH stats update during Public Forum

Run a minimum of two informative articles per year in the CSI monthly electronic newsletter.

1. Collaborative (PG&E, CCSE & SCE) article on MASH Track 2 awards
2. Semi Annual Report and Stats

Develop a proactive press strategy that allows other affordable housing news services to pick up articles/press releases pertaining to the MASH program.

1. Collaborate with San Diego Housing Commission, San Diego Housing Federation and Housing California to release MASH news in their newsletters.

Pursuant to D.08-10-036, collaborate with community stakeholders to develop training strategies targeted towards members of disadvantaged communities to help foster green job creation.

1. Green Learning Adventure – Youth
2. Working with the MAAC project and Association of CA Community Energy Services on leveraging funds for PV training during installations and education for youth in low income housing on sustainability.

### **Solar Map 2011**

CCSE is requesting a carry-over of 2010 CSI M&O funds to finalize developments to the solar map in 2010 which were not accomplished in 2010. Remaining items for 2011 include:

- Municipal Building Analysis
  - The acquisition of LiDAR data took longer than expected and pushed back the start of building shade analysis.
  - To date, 18 buildings have been completed with plans to analyze up to 60 more municipal buildings in the SDG&E service territory.
  - Learning from the LiDAR analysis, the project team is also evaluating the potential for releasing bulk analysis of large quantities of buildings throughout the service territory (see graphics below). The output of this work is less detailed but provides a high level review of usable/unshaded roof space. We hope to refine this methodology and add to the Solar Map.
- Decision making tool
  - Tool is coded and user interface is being finalized.





## M&O-Related Labor Allocation

### Methodology

CCSE utilizes its on-staff marketing and outreach teams to execute M&O efforts on behalf of all programs the organization administers. Each of the teams' staff members contributes some element of their time and expertise to CSI M&O and bills accordingly.

CCSE finds the practice of working with in-house teams to be the most effective way to ensure quality, knowledgeable and mission-oriented marketing and outreach support. These staff members are able to coordinate with and learn from program staff on a continual basis and thereby more cost-effectively develop a better understanding of program goals and needs than would contract or outsourced staff. Since we do not hire out our marketing and outreach teams, labor hours are associated with each task completed and billed appropriately to either the administrative or marketing portions of the budget. Generally, tasks that involve planning and/or require more solar or CSI-program expertise are billed to the admin budget and tasks that are defined more as execution including such things as writing press releases, designing ads etc. and require more marketing or outreach expertise are billed to the M&O budget. The budget allocations for each M&O category include any associated M&O labor, but do not include associated Admin labor. The labor allocation methodology remains the same in 2011 as approved in years past.

## Budget

This plan and corresponding budget is written based on M&O interim phase funding. CCSE understands that funding may change when the interim phase ends. CCSE recognizes that a change in budget allocation may significantly affect the ability to carry out this plan and meet the identified M&O goals for program advancement in 2011 and in the long term.

<b>CCSE PY2011 CSI Interim Marketing and Outreach Budget</b>	
Newsletter	\$30,000
Training & Education	\$100,000
Marketing Collateral	\$40,000
Online Training	\$30,000
Direct Mail and Digital Direct Mail	\$70,000
Bundled Outreach	\$60,000
Radio	\$70,000
Alliances and Co- Promotions	\$25,000
Interactive Outreach	\$45,000
PR/ Media	\$15,000
Cooperative Marketing Efforts	\$15,000
Subtotal	\$500,000
Solar Map (Carry-over)	\$79,878
MASH	\$25,000
Total CSI - General	\$579,878
Total CSI - MASH	\$25,000